Position Management Training

November 2018
CI Budget & Planning - Presenters

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Objectives

1) Understand Position Management

2) Review the Position Management Action Form

3) Answer end user questions

4) Solicit feedback
What is Position Management?

- Position Management tracks POSITIONS by assigning them POSITION NUMBERS.
- A person holding a position is an incumbent.
What is Position Management?

- With Position Management, a JOB is a union of the PERSON and a POSITION.

- A Job cannot exist without a Position and a Person.
- A Position can exist without a Job or a Person (a Vacancy).
Position Management – Headcount?

- A POSITION can have multiple incumbents
- A position's HEADCOUNT indicates the planned maximum number of incumbents for a POSITION
Headcount – Single Incumbent

- Normally, only one (1) POSITION is created for each appointment
- A unique POSITION NUMBER is required for:
  - All MPP positions
  - Most staff positions
  - All staff and faculty funded from multiple accounts (split level funding)
Headcount – Pooled Position

• Exceptions where multiple head count positions are created:
  • Tenure Track faculty positions
  • Temporary lecturer positions
  • Student / Work-Study positions
  • Some staff positions (job codes 2322, 2323, 2356, 2357, 2362, 2363, 2365, 2457, 4660)
Position Management Action Form

POSITION MANAGEMENT ACTION FORM
Budget & Planning

CONTACT INFORMATION
Requestor: ____________________________ Requestor’s Extension: ________________

POSITION NUMBER _______ EFFECTIVE DATE ________

POSITION ACTION
☐ New Position  ☐ Update Data  ☐ Position Reclassification  ☐ In-Range/In-Class Progression  ☐ Title Change

Working Title: ________________________________ Job Code: _______ Grade/Range: _______

Home Department #: _______________ Reporting Unit #: _______________ Reports to Position #: _______________

Time Base (1.0 for full-time, 0.5 for half-time, etc.): _______________

Fund Description: ☐ General Fund  ☐ Trust  ☐ Lottery  ☐ Student Health  ☐ Other  ☐ Reimbursed Activities
 ☐ Parking  ☐ Housing  ☐ Extended Univ

Position Status: ☐ Regular Position  ☐ Full-Time  ☐ Single Incumbent  ☐ Temporary Position  ☐ Part-Time  ☐ Pooled Position (Head Count: _______

Position End Date (if Temporary): _______________

FUNDING / DISTRIBUTION ACTION
Provide information in the following table to identify the accounting string(s) from which the position should be paid. All positions are set at position level funding. Appointment level funding applies to pooled positions in which the fund is different than the default position level funding. Use the template on the second page to dictate appointment level funding.

<table>
<thead>
<tr>
<th>Fund</th>
<th>Department</th>
<th>Program</th>
<th>Class</th>
<th>Project</th>
<th>Distribution %</th>
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Funding End Date (if Temporary): _______________
Position Management Action Form

- A Position Management Action Form (PMAF) is the means to create or modify POSITION data
  - PMAFs are submitted electronically via DocuSign
  - https://www.csuci.edu/vpbfa/docusign/
Position Management Action Form

- Creating New Positions or Backfilling Existing Positions

- A Position Management Action Form (PMAF) is needed for a:
  - Vacancy
  - New TEMP position

**NOTE:** New, REGULAR positions are only approved through the yearly budget process
Position Management Action Form

• **Updating Existing Positions**

• A Position Management Action Form (PMAF) is needed for a change in:
  • Job Code
  • Grade/Range
  • Time base
  • Home Dept ID #
  • Unit #
  • Working Title
  • Reports to Position #
  • Funding (Distribution of Labor Cost)
Position Management Action Form

• General Guidelines

• The effective date for a position action is generally the first day of the current month (however in some situations, a retroactive date is necessary)

• Submit PMAFs by the 25th of the month for actions to be active in the month submitted
Position Management Action Form

If you encounter an error...

**ACTION:**
Complete a Payroll Expenditure Transfer Form

**OUTCOME:**
Changes the accounting string and/or % distribution

**IMPACT:**
If one time error, no further action needed
If permanent change, must complete a PMAF
Demonstrations

1) Position Management Action Form

2) Payroll Expenditure Transfer Form

3) Funding Summary USA Report in CI Records

4) LCD Dashboard (access for authorized users only)
Questions / Feedback

- Budget & Planning website: http://www.csuci.edu/budget/

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